

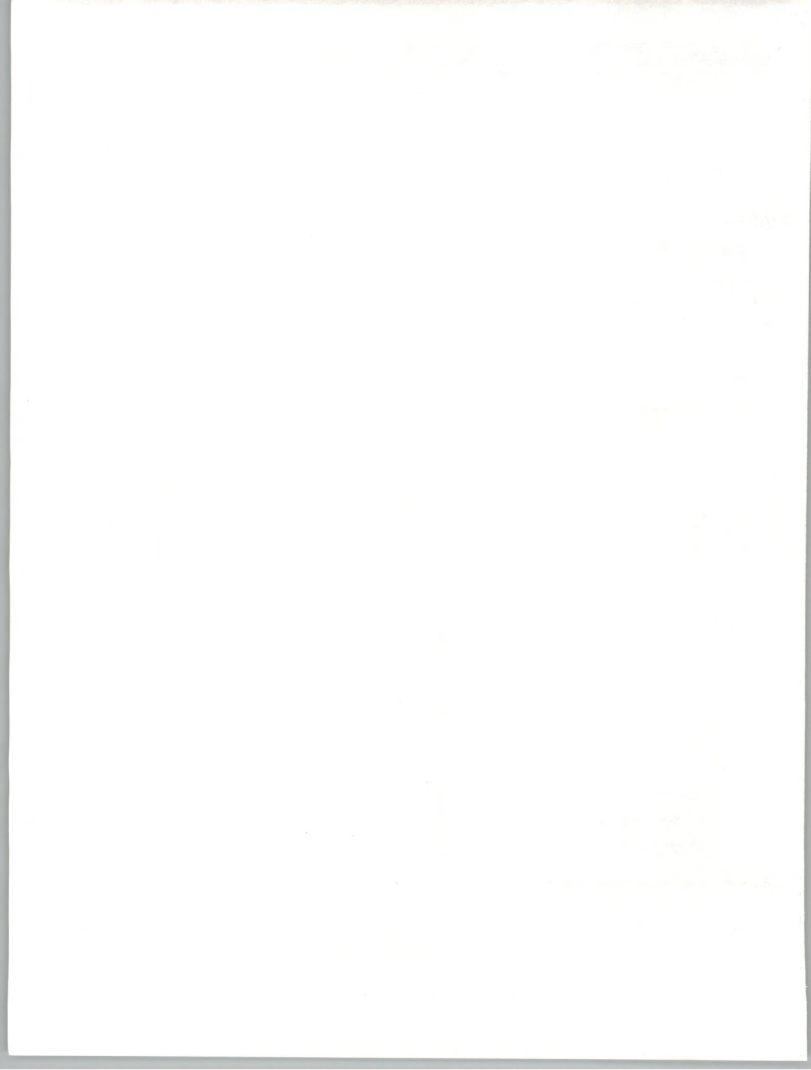
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The European Computer Software and Services Industry

The Challenge of the Single European Market— 1992 and Beyond

- A New INPUT Report
- Major Survey of Vendor Actions
- The Opportunities
 - Software Products
 - Professional Services
 - Systems Integration
 - Turnkey Systems
 - Processing Services
 - Network Services
 - Customer Services
- Review of 1992 Legislation
- European Forecast by 12 Member States






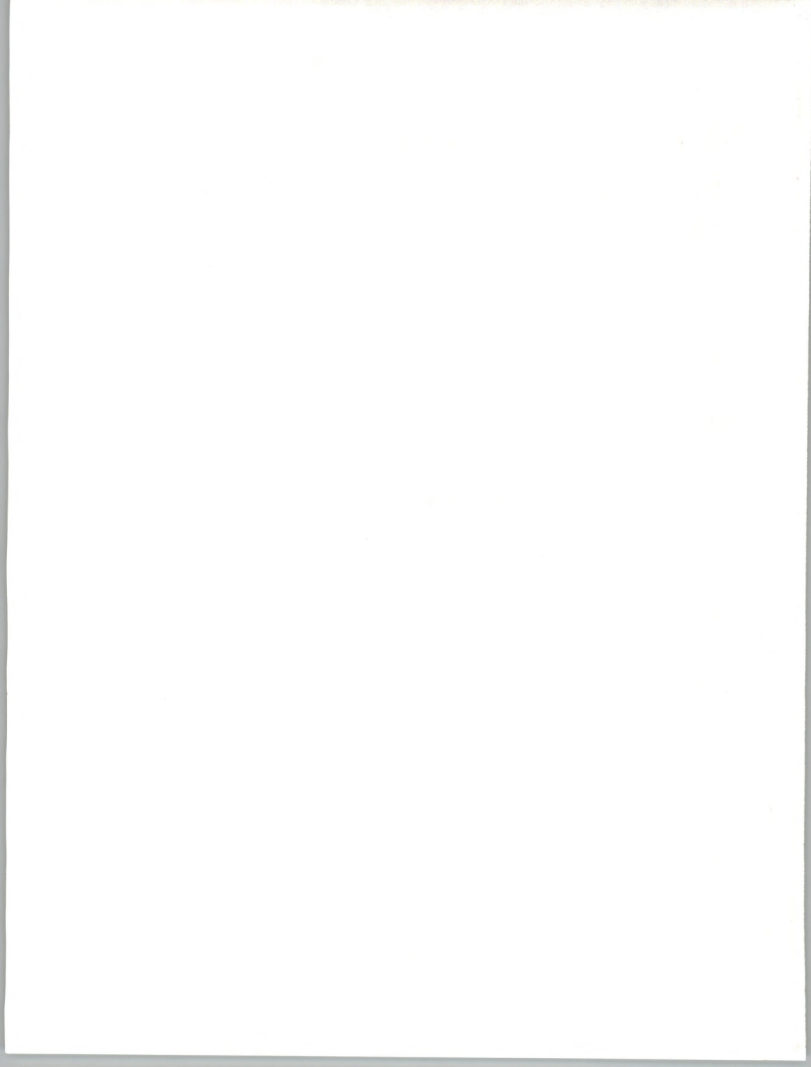
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The Challenge of the Single European Market—

THE SINGLE EUROPEAN MARKET

The wheels have been set in motion for the creation of the second largest consumer market in the world during the 1990s—the European Single Market.

The evolution of the 12 Member States into the Single Market will not happen overnight. The programme of legislative and regulatory changes already underway and continuing up to the 31st December 1992 is only the first of a number of crucial changes to the European environment.

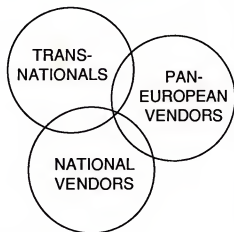
Paying specific attention to the computer software and services industry, INPUT reviews and analyses in this report:

- The historical development of the concept of the European Single Market
- The planned changes to remove crucial barriers within the European Community
- The likely impact on different industrial and service sectors
- The programmes already established by the European Commission to assist in this change
- Specific 1992 legislation aimed at the computer software and services industry

SUBSCRIBERS TO THE RESEARCH STUDY WILL BE ABLE TO:

- Understand the new opportunities and threats of the single European market
- Evaluate the actions of competitive vendors in positioning their businesses
- Plan the best European strategy based on a detailed assessment of the legislative and regulatory impacts on the software and services market

TYPES OF VENDORS



VENDOR ACTIONS

What have computer services vendors done today in preparation for the European Single Market of tomorrow?

What are they planning to do?

What will be the specific impact on the computer software and services industry?

What new opportunities will be opened up after 1992?

INPUT's survey searches out what vendors are actually doing today:

- Internal reorganisations, re-education of staff and new recruitment policies
- New relationships with external organisations through collaborative agreements, joint ventures, acquisitions and mergers
- Co-operation with Brussels and involvement in EC projects and working groups

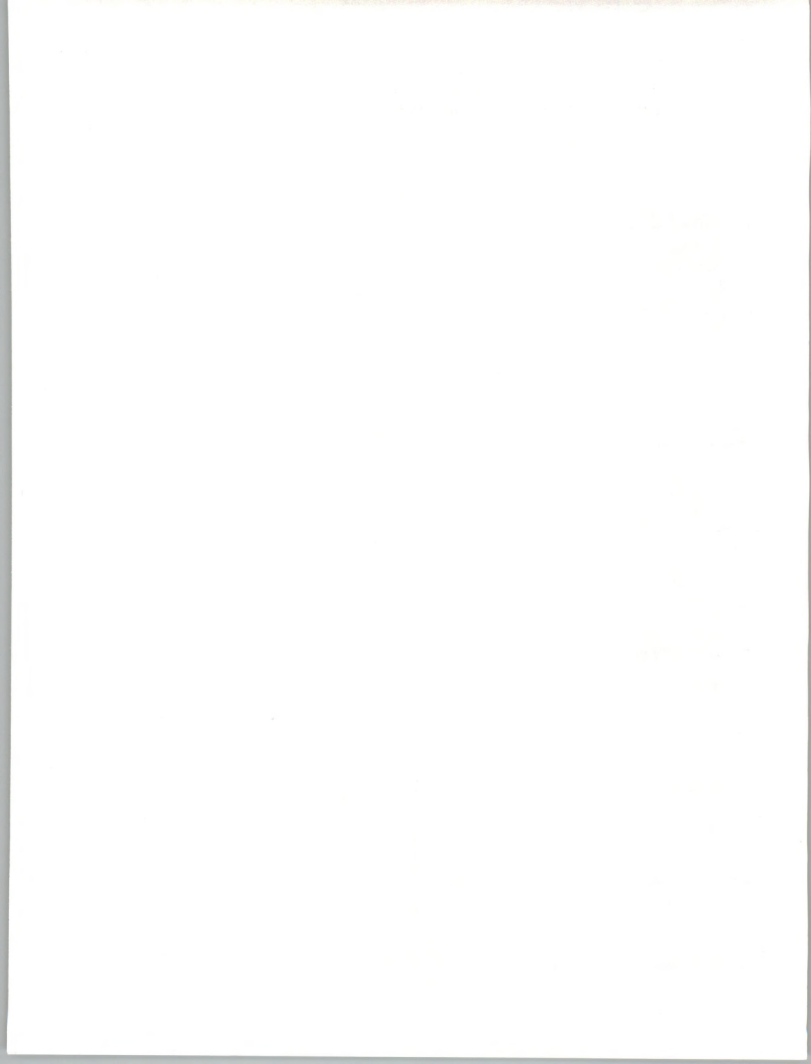
EUROPEAN STRATEGIES

How do vendors see that they should change their strategies for the post-1992 era?

Should they become more European, and if so, how?

INPUT's research identifies key strategies for different types of vendors towards the Single European Market. In particular, it looks at:

- Equipment vendors and independent services vendors
- U.S. versus European vendors
- Transnational versus pan-European versus national-only vendors
- Different software and service sectors



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INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

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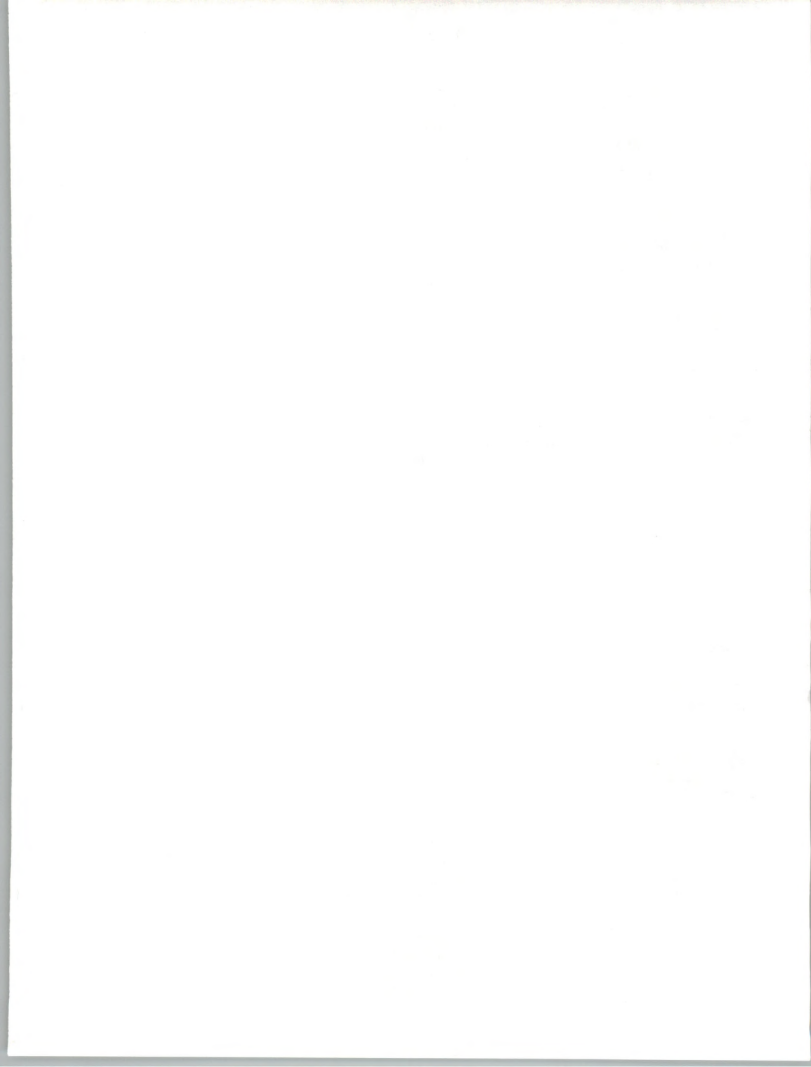
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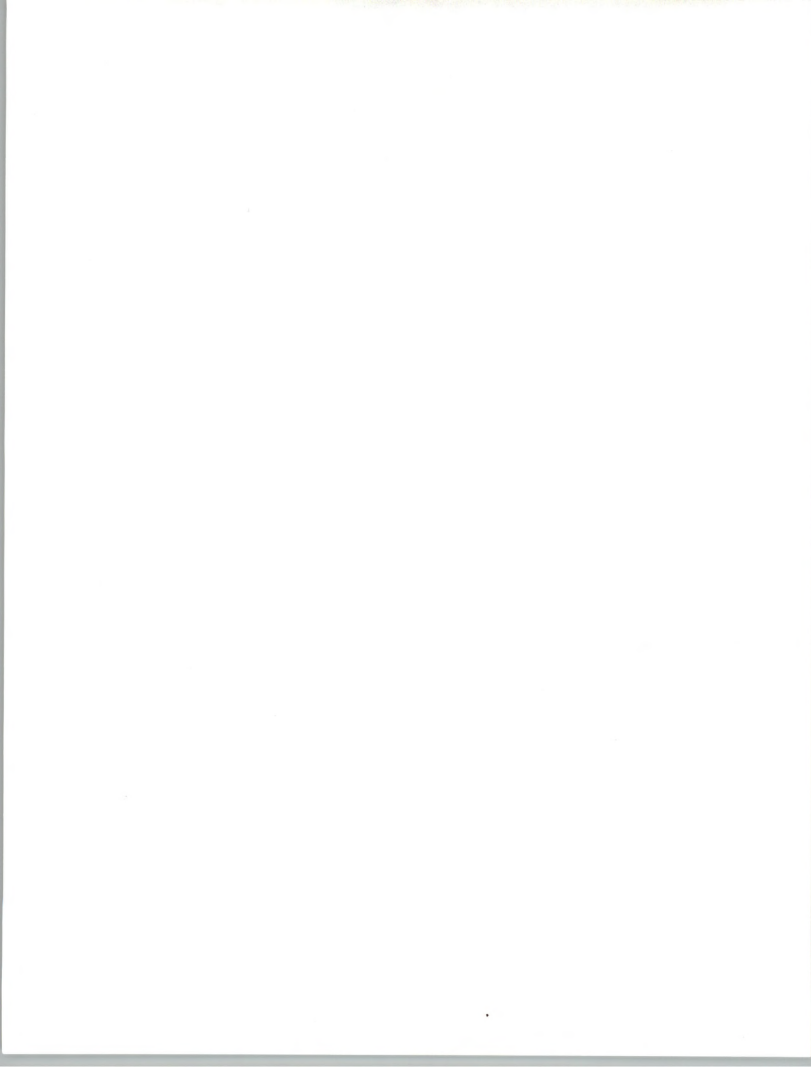
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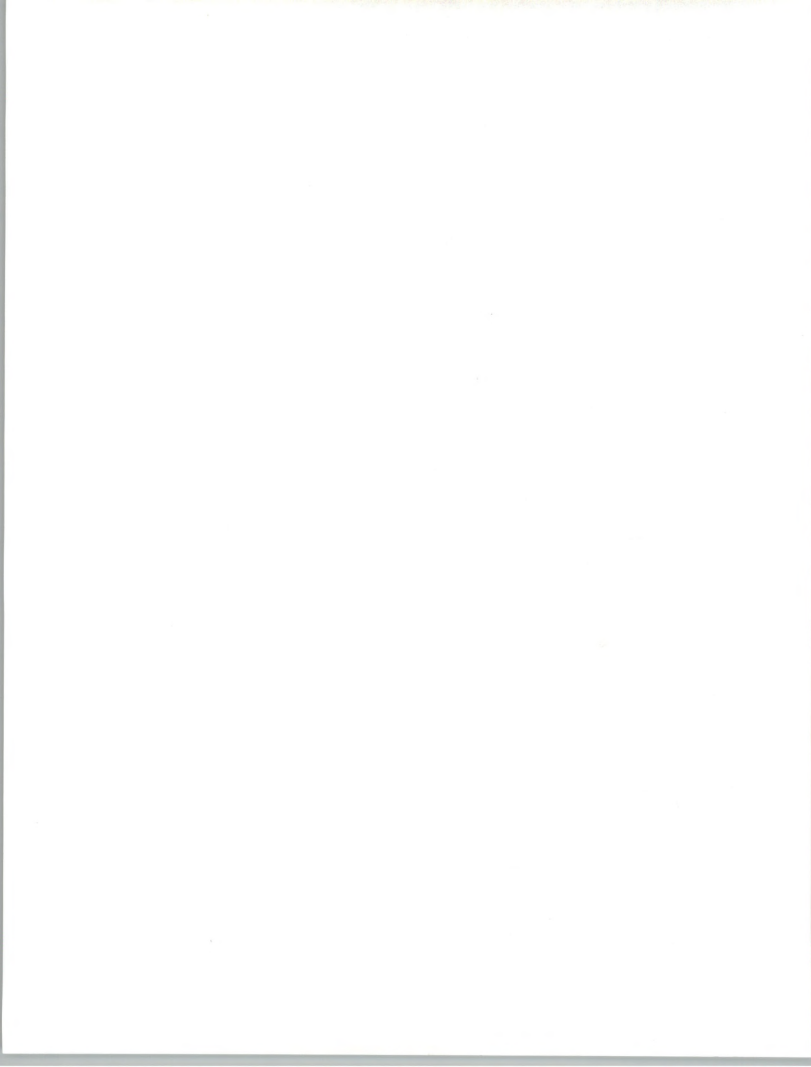
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The attached brochure is for an in-depth report aimed at your marketplace. By purchasing this report, you will learn the real issues behind the planned changes and will be better placed to increase your market share in Europe.

To order the report, simply fill out the enclosed authorization form and mail or fax it to INPUT.

I look forward to hearing from you.

Yours sincerely,



Robert Goodwin
Vice President, Research
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FROM: Tomoko Fukuyama, FKI

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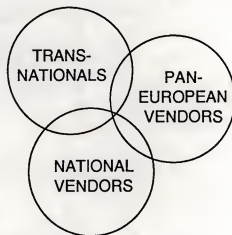
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1992 and Beyond

The 12 European national markets are today very different. Not just because they speak different languages and have different cultures, but also because they have different attitudes, and traditions in buying computer software and services.

How are they likely to come together as a Single Market in the 1990s?...Or will they stay separate national markets for many years?

INPUT's experience and research in the computer software and services industry will be used to forecast and discuss:

- Overall market growth from 1989 to 1994 by individual national states
- National differences
- Key industrial sector opportunities
- The competitive environment



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